

**Uniform Methods Project: Steering Committee Conference Call**  
**January 23, 2013**

- Chuck – we'll be giving project update and discuss adoption ideas
- Roll call
- Sandy Pizelli (?) replaced Diana Lin from NASEO
- Protocols are posted to Steering Committee website
- Have any SC members noticed anything of note in the protocols?
- We plan to go public Friday, so can give feedback up to then
- Steve Schiller – I missed a prior approval by the committee. I looked at these for the first time in final form this week. Is there a recommendation by the technical committees? Have they signed off on this? Have the public comments been responded to?
- Chuck – we sent out to the technical advisory committee
- Tina – we should step back and talk about the process.
- Chuck – after we did the public review and presented to the SC in September, Cadmus and TEs have edited documents and went out for final TAG review. Making an announcement to commenters letting them know we integrated their comments, asking for more feedback. After that final review, Cadmus performed an edit, NREL performed an edit. Sent documents back to TEs to approve edits. Sent out documents to TAG to see if they have feedback. TEs and TAG were happy with edits. Sent out to DOE and public review.
- Bill Newbold – The SC hasn't seen anything that indicates what changed from last time they saw it.
- Chuck – That's correct. Can reconstruct a tracked changes document.
- Bill – That would be useful
- Steve – There are about 30 people on SC; getting no response from people doesn't mean that its fine, it can mean a lot of things.
- Mike Li – Here's where we have addressed this issue. We sent out an email for SC to approve their names being attributed to SC. If you agree to put your name on the document, you are agreeing to sign off on it.
- Bill – Except that the document might not be the same.
- Mike – We will send you tracked changes version of document.
- Chuck – We should probably hold off on going public then.
- Bill – I haven't been through it, too long.
- Steve – I don't think I will ever be able to go through it. I didn't think the role of the SC would be to do a technical review.
- Chuck – True, please send any comments in an email to us. We can go back to the TAG to ask them to respond more directly to protocols. Action items:
  1. Tracked changes document
  2. Formal recommendation from TAG
- Outreach – webinars and conference attendance
- Phase II – plan to start NTG section by Spring

- Recommendation to hold off on NTG until we see results of other projects (NEEP). That document is on policy level, UMP will be on technical level (surveys, sampling, etc.)
- Steve – I scanned comments. Some people are happy we decided not to address NTG. Intro seemed to say NTG is a jurisdiction thing and we won't cover. Here, we're saying we'll deal with it later. Appliance recycling does have a NTG section. Can you talk about decision on including NTG? I think it's good to have.
- Chuck – We need to re-send the outline. Not sure if NTG outline for UMP is similar to impact guide.
- Julie Michals – Responding to questions about not pursuing net savings last year. I advised waiting on the net savings piece to first focus on gross savings and NEEP was in the process of doing policy research on use of net vs. gross savings for different policies. I suggested to wait for project to be completed. We have a public paper now available. There's a need to look at alternative methods to look at market effects. There is value for the stakeholders in the region we cover to pursue net savings protocols.
- Hossein – Among the comments we received, some people said it's good we didn't deal with NTG. We also had a number of other reviewers who wanted us to include NTG.
- Tina – The outline developed last Spring was an early outline and it is evolving based on conversations we had since then. I wouldn't suggest that will be the outline for the NTG chapter that will happen. It's more of a starting point and we are continuing the conversation.
- Hossein – We put that on hold after the decision was made to postpone it.
- Bill – To Julie's point about the SC collectively deciding, too few of the members present to decide on anything today. Also, NTG is fluid and developing, just getting to consensus on best method will be a fascinating discussion.
- Julie – It might be helpful for Cadmus to do a primer for the SC to discuss process – what does it take for the SC to agree on an agenda. Secondly, we should have some type of overview to our best knowledge about common practice that's out there. What might the outcome look like given what we are trying to achieve. Is there a whole range of diverging practices and what are they? Would help give boundaries around effort. Complex issue and will probably not get agreement across board.
- Marianne Rawles – Why did you decide not to discuss mechanics on NTG?
- Julie – Every year we conducted survey in Forum region asking what we should address. NTG always ranked high. Challenge is that stakeholders have different views. Some people want to calculate NTG, some think current methodologies need to be changed, some don't think NTG should be included at all, etc. We informed Forum SC that if there was a national effort, it would make sense to piggyback on that effort.
- Steve – We should start with some type of scoping discussion. We first need to decide what is in and outside of net savings. Not sure can lead to uniform method.
- Julie – It's valuable to present commonly used methods; show pros and cons of different methods. Some approaches can be useful for different approaches. A guidance document would do the same thing. Would not be one size fits all. Would also show shortfalls of each method.

- Chuck – Sounds like we are far from consensus. We should do a meeting where we present issues surrounding NTG. That's something we can set up using the current outline as a starting point.
- Tina – We formed the NTAG last spring. Some members of SC more interested in this issue than others. Maybe would make sense for the NTAG to meet first and flush out issues before SC meets.
- Chuck – That sounds good. I would like to move forward into adoption ideas. We won't be funding much more of Phase II until we get an idea of the adoption of the protocols. In order to keep the project moving, we need to look at adoption.
- Will be presenting an overview at AESP conference next week. Will also have a workshop at IEPEC. Some experts have submitted abstracts (Doug Bruchs, Mimi Goldberg, Ken Agnew, Scott Dimetrosky)
- Current activities – Dakers and Kevin using UMP for PPL evaluation; David – most are used in New England; Scott – lighting metering
- Cadmus is using UMP as training tool for new staff
- Steering Committee ideas
- Michael Brandt – got TRM approved by Illinois Commerce Commission
- Steve – How does it get referenced in TRM
- Chuck – To align algorithms from UMP with those of the TRM
- Michael – We looked at how closely we were aligned. Only 3 minor divergences.
- Chuck – Were the divergences specific to UMP?
- Michael – I can send an email with specifics.
- Steve – It sounds like the elements of the TRM with equations would match with what is in UMP. If there's consistency, that's good, but the UMP are M&V methods and have been used for decades. Should be the same.
- Tina – One would expect that, but we haven't seen that as much as we have hoped. HVAC algorithm, for example, showed a lot of variance.
- Chuck – Nike Dietsch had a comment. He suggested UMP can be referenced in State Implementation Plan Roadmap.
- Tom Eckman reported that RTF is making sure their protocols are consistent with UMP.
- Kevin Gunn brought up point of having UMP recommended by Public Service Commissions.
- ? – Kevin Gunn recently resigned from PSC, not sure if new person appointed yet.
- Julie Michals – NEEP is developing general EM&V guidance document, which will reference UMP. Will be encouraging states to reference UMP in RFPs. Hard to do for each state, given there are different places the guidance documents can be used. New York has a discrete set of evaluation documents, but recommends documents such as NAPI. Most states do not have a discrete set of evaluation guidelines. Will talk to our SC to make sure this approach makes sense (NY as model).
- Steve – One thing for DOE to think about is whether you're asking states to reference, require, or adopt methods. With respect to requiring adoption, most are M&V approaches that are labor-intensive. Many jurisdictions moving toward deemed savings approaches.

- Julie – To clarify, when we developed guidance document, we made clear that where evaluation is conducted, these are approaches and methods to consider and are voluntary. Important for document to be clear that it is set of guidelines. A lot of important context to present.
- Mike Li – We're not asking people to choose between different use pathways. Saying you can use UMP in a variety of ways. As it relates to M&V, we're saying if there is any requirement, this is how you should do it. Not saying you need to do M&V for every program.
- Bill – In Michigan, I view the impact being in revisions of TRM we use. Might be better to use than other M&V documents imported from other states.
- Mike Li – Make sense to me.
- Marianne – Mike laid out 2 approaches – 1. Commissions to use UMP as starting point. Makes sense. Better than Commissions requiring all or nothing adoption with UMP. Maybe 80% of protocol works, but other parts won't.
- Mike – The issue that comes up a lot is that there is a lot of arguing about results of an impact evaluation. Eliminate regulatory risks of EM&V. Difference between giving someone freedom and telling them which to use. Each user/commission needs to decide most important thing, risk vs. freedom.
- Marianne – I agree, as long as materials are presented with those options in mind.
- Bill – DTE Energy will work with evaluators to make sure are consistent with UMP. The issue is that they don't cover everything yet. Keeping protocols updated is also a really difficult process. Useful for outsiders to see how good are our answers.
- Phyllis Reha believes that MN is relatively sophisticated in EM&V and suggests contacting Conservation Improvement Program to see what they are up to.
- Nancy Seidman suggests encouraging EE and AQ agencies to use protocols.
- Chuck Rea – Mid-American is going to file next five-year energy plan in Iowa on Feb 1<sup>st</sup>. As part of that, we have EM&V section of plan. We will reference UMP and will say that EM&V work that we do will be done in accordance with the standards developed in UMP. With that in plan, when we bid out for a contractor to provide services, the bid package must show how activities will be done in accordance with UMP. Iowa does not have a TRM. We think they should have one. We will file a Mid-American specific TRM as part of plan. Algorithms that are referenced in TRM will be consistent with UMP. We are in a position in Iowa to lead from the front and is what we intend to do.
- Chuck K. – Has MEEA been involved in your process at all?
- Chuck Rea – No, they have not.
- Steve – About Nancy's recommendation. The objective is to move to less complexity. Wants to urge caution.
- Mike Li – We have talked to EPA and there is a big faction of people who want to go the other way. They want to know how close to 100% precise we can be when it comes to measuring energy savings. Although no real answer, the question comes up a lot.
- Steve – Found that complexity of EM&V has been a barrier.
- Mike Li – We found it's not the complexity of EM&V, but the complexity of EPA rules.

- Steve – I'll let Niko speak for himself on that, but we need to sort this out. One way we can get a lot more efficiency is through federal requirements.
- Chuck – Next steps. We would like to continue development of SC ideas. We should have one more SC meeting on this overview. We'll be in touch over the next couple of weeks for the next Steering Committee meeting.